Ombudsman Case Tracking System 2.0 (OCTS 2.0) User Reference Guide

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Module 7: Using Charts

Ombudsman Case Tracking System 2.0 (OCTS 2.0)

User Reference Guide

Goal

To better serve our customers, the borrowers of student financial assistance loans, in attempting to resolve their complaints and issues using the new Ombudsman Case Tracking System (OCTS 2.0).
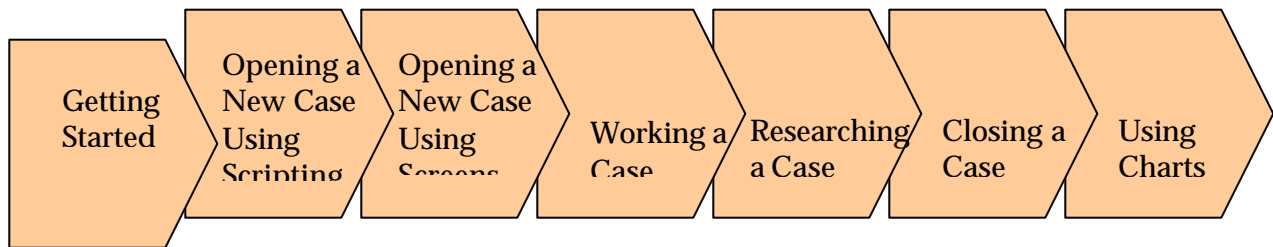
About this Guide

Overview

This document outlines the procedures that you will follow to complete your work using the new Ombudsman Case Tracking System (OCTS 2.0).

The guide provides a step-by-step walkthrough of each procedure. These procedures will be demonstrated on the live system during training, and this guide will be used as a reference after training.

Your work has been divided into modules. Each module is a separate section in this binder.

Getting Started → Opening a New Case Using Scripting → Opening a New Case Using Screens → Working a Case → Researching a Case → Closing a Case → Using Charts

Objectives

After reading this guide, you will be able to do the following using OCTS 2.0:

- Launch OCTS 2.0 and define the parts of the basic screen
- Answer customer calls and create new cases using scripting
- Use the screens to open new cases
- Work existing cases
- Research cases using the Knowledge Base
- Close cases
- Use charts to view your data.

Using this Guide

The lessons in this guide outline the steps for each procedure; however, in most lessons, the guide assumes that you press the **Tab** key on your keyboard between each step to advance through the fields. Therefore, remember to press **Tab** between each step. In addition, each lesson begins as if you have just logged on to OCTS 2.0. After you become more familiar with navigating through the system, you will find faster ways to navigate to your desired screen.

Below are several examples of symbols used in this guide to help you learn OCTS 2.0.

<u>Example</u>	<u>Description</u>
Click, Pick, Select, etc.	Italicized words indicate **an action** that you must take in order to complete the step.
New button	Bolded words indicate **a button** on the screen that you will click. Bolded words can also indicate emphasized instruction, e.g. steps that may be confusing or very important.
	This symbol indicates that the field is a **required field**. OCTS 2.0 will not save a new record until you enter all the **required fields** for that record. In this guide, we will also designate required fields in ***bold italics***. In scripting, **required fields** are designated by an asterisk (*) before the question or text.
 Take Note	This symbol indicates an important piece of information about OCTS 2.0 that will help you understand the procedure and navigation through the system.
	This symbol designates a point in the lesson at which you should stop and read the instructions carefully. It may indicate a break in the steps where you must proceed differently, according to the particular situation. This will also help you to understand the different sections of each procedure.
Press **F2**. Or *Click…*	Navigating and inputting data into OCTS 2.0 is best completed via the keyboard because it saves time and is more efficient. Therefore, all steps in this guide are described using keyboard actions. However, alternative methods using the mouse are described immediately after each step.

Saving Information in OCTS 2.0

OCTS 2.0 will save a new record of information only *after* you populate the **required fields** for that record. If you are entering a new record and attempt to leave that section of the screen without entering the required fields, the system will prompt you by giving you an error box. This error box will tell you the name of the required field that you left blank.

However, entering new information within a "Pick Box" is an exception to this rule. You *must press* the **Pick** button at the bottom of the Pick Box to save the information. If you press the **Cancel** or **Close** button, you will lose your data!

Searching for Information in OCTS 2.0

In Module 4, Lesson 1, you will learn how to find a particular record or set of records using queries. However, when searching for records in a Pick Box, there are two fields at the top of the Pick Box that are labeled "Find" and "starting with." In the **Find** field, you can select the field on which you want to search. In the **starting with** field, you can enter the value that you want to search. For instance, in the Pick Contact Box and in the Pick Account Box, you can select "Account" in the **Find** field. You can then enter the borrower's SSN in the **starting with** field and press the **Find** button (located next to the starting with field). This will find all records that meet that criteria.
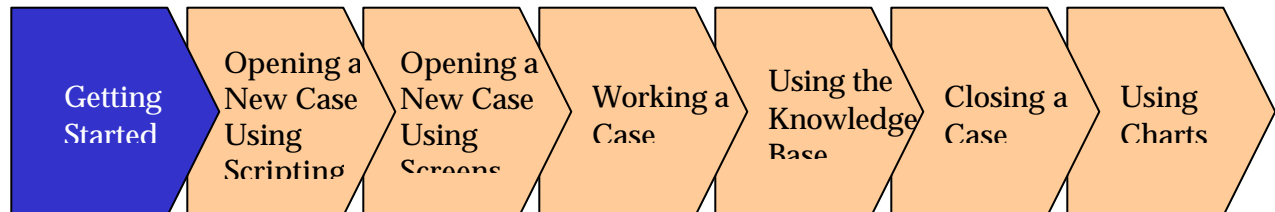
Remember to refer to this section of this guide as you follow each lesson. These reminders will help you as learn more about OCTS 2.0!

Take Note

Module 1: Getting Started

Lesson 1: Logging On
Lesson 2: Overview of the Basic Screen

| Getting Started | Opening a New Case Using Scripting | Opening a New Case Using Screens | Working a Case | Using the Knowledge Base | Closing a Case | Using Charts |

About this Module

Overview

This module illustrates how to get started on OCTS 2.0. This includes logging on to the system and understanding the basic screen.

Objectives

After reviewing this module, you will be able to do the following:

- Launch OCTS 2.0
- Log on to OCTS 2.0
- Identify and understand the parts of the OCTS 2.0 screen.

Lesson 1: Logging On

Description: **To get started, you must know how to launch OCTS 2.0 and log on.**

1. *Turn on* your computer.

2. *Log on* to your computer as you currently do today.
   When your desktop appears, you will see a folder labeled OCTS 2.0.

3. *Double-click* on the folder to open the folder.

Take Note

As an **Intake Specialist**, you will see two icons inside the folder—one labeled Thin Client, and one labeled Dedicated. **You will use the icon labeled Dedicated.**

As an **Ombudsman Specialist**, you will see on icon inside the folder labeled Thin Client. **You will use the icon labeled Thin Client**.

4. *Double-click* on the appropriate icon (Intake—Dedicated, Ombudsman—Thin Client).
   This will bring up the OCTS log on box.

5. *Click* in the User Name field.

Take Note

Your User Name will be the first letter of your first name and your full last name. If you have an **alias, you will use your alias last name**. For example, if Jane Doe's alias is Jane Smith, then Jane's User Name is "jsmith."

6. *Enter* your User Name.

7. *Press* the **Tab** key on your keyboard.

8. *Enter* your Password.

Take Note

If the User Name and Password that you have entered are incorrect, the screen will go blank. You must close the application by clicking the "X" in the top right corner of the screen. You must then repeat steps 4-8.

If you have additional problems with your password, please contact the System Administrator. Only the System Administrator can change your password.

If you are an Intake Specialist, follow steps 9-11. If you are an Ombudsman Specialist, follow steps 11-12.

9. *Click* the **drop-down arrow** button in the Connect to field.

10. *Select* "Production."

11. *Press* **Enter** on your keyboard.
    Or *Click* **OK** button on the screen.
    This will launch OCTS 2.0.

If your web browser commands are visible (e.g. Back, Forward, Stop, Refresh), you can follow the step below to enlarge OCTS 2.0 to a full screen.

12. *Click* **View** on the web browser menu bar. *Click* <u>**Full Screen**</u> (shown below).
    This will enlarge the OCTS 2.0 screen. The web browser commands have been compacted into one bar across the top of the screen.

Take Note

If you would like to return the screen to its original format (with the web browser commands enlarged at the top of the OCTS 2.0 screen) *click* the **Full Screen** icon that has appeared at the top of the screen.

Congratulations!

You have now logged on to OCTS 2.0! You are ready to learn about the screens and begin working!

Lesson 2: Overview of the Basic Screen

Description: **During training, the instructor will describe the basic OCTS 2.0 screen to you using the live system.**

After training, if you need a review of basic navigation, please refer to the Training Pre-Read that you received prior to this class, entitled *OCTS 2.0 Basic Navigation.*

Let's review the following about the basic OCTS 2.0 screen:

- Tab bar
- View bar
- Record
- List applet
- Form applet
- Field
- Menu bar
- Tool bar
- History bar
- Thread bar
- Message bar
- Saved Query box.

See the screen print on the following page to view the location of each screen component.

History Bar

Menu Bar

Thread Bar

Tool Bar

Saved Query Box

Tab Bar

View Bar

List Applet

SelectedRecord

Form Applet

Message Bar

Field

Tab Bar   Provides access to frequently accessed screens. The screens on the tab bar allow you to access different information, e.g. Cases, Contacts, Accounts, Activities.

View Bar   Allows navigation between available views for the current screen. The views on the view bar appear on the left of the window when a screen has been selected. The views on the view bar will change, depending on the screen selected.

Take Note   **Example:** If you think of OCTS 2.0 as a filing cabinet, the screens are the drawers of the cabinet where you store different information (e.g. Cases, Contacts, Accounts, Activities). Each drawer contains various files that organize the information in that drawer. The views in OCTS 2.0 are these "folders" within each screen that organize the data related to that screen (e.g. My Cases, All Cases, Attachments).

Record   A record is one case, one issue, one contact, one account, one result, one attached document, or one loan.

List Applet   An applet is a section of the screen. A list applet shows a list of records—each row is a record. You can scroll up and down the list, and you can scroll right and left to see all of the fields in the record.

Form Applet   A form applet displays the detail of the selected record in a "form" format. (The selected record is highlighted, with a red arrow in the far left column.) You can see all of the information at one time.

Field   A field is a box in which data is entered. A field can be free-form text (meaning you will type the desired value into the field), drop-down box (you will press F2 or click the **drop-down arrow** button to bring up the picklist of predetermined values), a date field (you will enter the date or select the date from the calendar), or a field automatically populated by the system.

**Menu Bar**   Allows you to access application features from menus and submenus.

Tool Bar   Gives you access to the most commonly used commands. The descriptions of the buttons are in the table on the next page.

History Bar   Allows you to navigate through the screens that you have previously used.

Thread Bar   The thread bar appears below the tool bar to the right of the history bar. As different views relating to one record are accessed, the system will display the navigational path in the thread bar.

Message Bar   Shows a scrolling sequence of messages from the management team.

Saved Query Box   Accesses predefined queries and other queries that you save.

The following table explains the function of each button on the tool bar. If you hold your mouse over one of these buttons in OCTS 2.0, the name of the button will appear.

Button	Function
	Add New Record—Adds a new record. **Note:** The preferred method of adding a new record is right-clicking your mouse and choosing from the menu that appears. Therefore, you will not see this tool bar button used in this guide.
	Insert Record—Will not be used for OCTS 2.0.
	Copy Record—Inserts a copy of the selected record. **Note:** The preferred method of copying a new record is right-clicking your mouse and choosing from the menu that appears. Therefore, you will not see this tool bar button used in this guide.
	Delete Record—Deletes the selected record. **Note:** The preferred method of deleting a new record is right-clicking your mouse and choosing from the menu that appears. Therefore, you will not see this tool bar button used in this guide.
	First Record—Goes directly to the first record on the list.
	Previous Record—Goes to the previous record on the list.
	Next Record—Goes to the next record on the list.
	Last Record—Goes directly to the last record on the list.
	Sort Descending—Sorts the records in descending order based on the selected column.
	Sort Ascending—Sorts the records in ascending order based on the selected column.

⌕	**New Query**—Creates a new query.
⌕	**Execute Query**—Retrieves records that meet the query criteria.
✂	**Cut**—Cuts the highlighted selection.
▤	**Copy**—Copies the highlighted selection.
▤	**Paste**—Pastes the copied selection.
☷	**Synchronize Calendar/PIM**—**Will not be used for OCTS 2.0.**
♒	**Find**—**Will not be used for OCTS 2.0.**
⍤	**Message Bar**—Takes away the Message Bar and makes it reappear.
▶?	**Help**—Allows you to click on a section of the screen and bring up Siebel Help. **Important Note**: Because the Siebel application was customized for the Office of the Ombudsman to make OCTS 2.0, some Siebel terms and procedures were changed. Therefore, Siebel Help contains terms and procedures that will not be familiar to you in OCTS 2.0. **It is important that you refer to this User Reference Guide for instruction.**
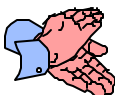
You have now identified and defined the main parts of the OCTS 2.0 screen!

Congratulations!

Module 2: Opening a New Case Using Scripting

Lesson 1: Scripting Overview
Lesson 2: New Customer/New Case
Lesson 3: Third Party/New Case
Lesson 4: Existing Customer/Existing Case
Lesson 5: Existing Customer/New Case

Getting Started → Opening a New Case Using Scripting → Opening a New Case Using Screens → Working a Case → Using the Knowledge Base → Closing a Case → Using Charts
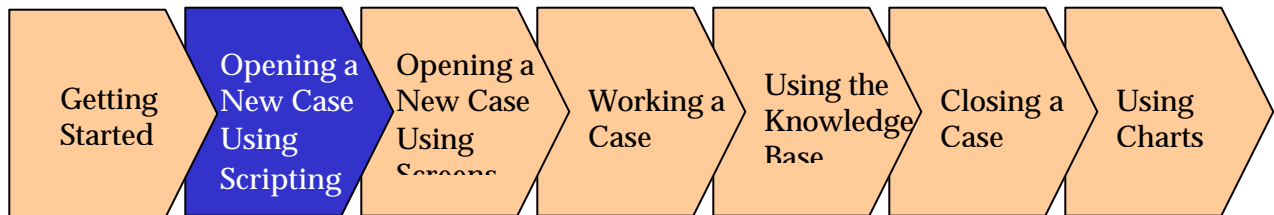
About this Module

Overview

This module describes how Intake Specialists will use scripting to log customer information when answering incoming Ombudsman calls. Ombudsman Specialists will not use scripting, and therefore will not receive this module during training.

Scripting covers the following scenarios: a new customer with a new case, a third party with a new case, an existing customer with an existing case, and an existing customer with a new case.

Objectives

After reviewing this module, you will be able to do the following:

- Open a new case for a new customer using scripting

- Open a new case for a third party using scripting

- Use the screens to review an existing case for an existing customer

- Open a new case for an existing customer.

Lesson 1:   Scripting Overview

Description: **Scripting has been developed to guide you through the call intake process. The script will prompt you to ask certain questions and to record all required information from the caller. Depending upon the answers you select, you will follow a different path in the script.**

Let's review the following about the OCTS 2.0 scripting screen:
- Script Screen
- Left View Bar
- Dashboard
- Scripting Tabs
- Script questions
- Notes to the Intake Specialist
- Required Asterisk
- Drop-down arrow
- Cancel button.

Script Screen   Provides access to scripting.

Left View Bar   Allows you to view your progression through a script. If you need to back up to a previous question, you may click on the appropriate question on the left view bar.

- Red question marks indicate a required field. This question must be answered before moving on.
- Yellow question marks indicate a field that is not required and has not yet been completed.
- Green check marks indicate that you have successfully completed a question.

Dashboard   This is the area of the screen above the Left View Bar and Scripting Tabs. The case number will display here at the completion of a script, after a new case has been created.

Scripting Tabs   Scripting tabs are located above the scripting questions. These tabs house information related to different sections of the scripts. Different tabs will become available as you progress through the script.

- **Greeting**—determine if call is about a new or existing case
- **Profile**—enter profile information about the borrower
- **Loan Information**—enter information about the loan involved in the case
- **Third Party Contact**—enter profile information about the third party contact
- **Account Search**—search for an existing account to add a new case
- **Issue Information**—enter information about the issue (e.g. issue summary, main issue category)
- **Discussion**—provides discussion points and questions intended to help resolve the case
- **Closing**—conclude the call; provide case number.

Script Questions   Script questions prompt you to record certain information from the caller.

Notes   Statements preceded by [NOTE:] are messages **directed to you**. They are not meant to be said aloud to the caller, unless verification of an answer is necessary.

Required Asterisk   Questions that are preceded by an asterisk (*) indicate a **required field**. These questions **must be answered** before moving on. These are the same fields that appear with a red question mark next to them in the left view bar. If you attempt to skip one of these required fields, you will receive an error message.

Drop-down Arrow   This arrow indicates that there is a picklist associated with the question. You may press F2 on your keyboard to view the list, or click on the arrow with your mouse. You must respond to the question with an answer from the picklist. You may not enter your own value.

Cancel Button   This button will cancel the script. Any information that you have entered will not be saved. For example, you will use the Cancel button if you begin a script and then determine that the call is a general assistance call.

Let's review how to navigate through scripting:

Move forward   Press the **Enter** <u>or</u> **Tab** button on your keyboard to advance to the next question.

Move backward   Right click your mouse and select **Back Up** to go back to the previous question.
Or, use the Left View Bar to navigate to questions and click your mouse in the desired question.
Or, use the Scripting Tabs to navigate to different sections of the script.

Be careful when backing up or answering questions out of order. To ensure that you are recording the information correctly, go through the script from start to finish, pressing **Enter** or **Tab** to advance.

Take Note

F2   Press **F2** any time that there is a **drop-down arrow** in a question. Pressing F2 will bring up a picklist (list of possible answers for that question) or a Pick Box.
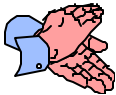
You have now identified and defined the main parts of the OCTS 2.0 script! You have also learned basic script navigation!

Congratulations!

Lesson 2:   New Customer/New Case

Description: **Most often, you will use scripting to open a new case for a new customer. The script will lead you through the process of gathering information about the customer and his/her case. At the end of the script, you will determine whether or not you can resolve this customer's issue.**

1. *Go to* the Script Screen.

2. *Select* Greeting and *click* **OK**.

Begin the script by asking the caller the questions below.

Take Note

Remember, you must answer all questions that are preceded by an asterisk (*). Press **F2** for any question that has a **drop-down arrow** to view the values in the picklist. Press **Enter** or **Tab** to advance to the next field.

3. * Is this your first time calling our office?
    Select Yes. Remember, in this lesson we are reviewing the procedure for a new customer with a new case.

Take Note

It is important to note that this question is trying to determine if there is an existing account for the borrower. If the caller is a third party contact, this may be his/her first time calling the office even though an account exists for the borrower. If an account already exists for the borrower, *press* **Cancel** and begin again, following Lessons 4 or 5 of this module.

4. * How may I help you today?
    Enter the Issue Summary.
    This is a free-form text field in which you should describe the root cause of the case.

Take Note

If you determine that this is a general assistance call (e.g. caller needs to be transferred to another office), press Cancel and use the screens to log a case under the John Q. Public account (see Module 3, Lesson 3).

5. * [NOTE: Select Issue Category.]
    Press **F2** on your keyboard once the Issue Category question is highlighted by the red box.
    Select the root cause of this case from the values in the picklist. If you know the first letter of the desired value, press that letter on your keyboard.

6. *Use* the up and down arrow buttons on your keyboard to navigate up and down the picklist.

7. *Ensure* that the desired value is highlighted in blue.

8. *Press* **Enter** to select that value.

9. * [NOTE: Select Issue Sub Category.]
   Press **F2** in the ***Issue Sub Category*** field.
   This will bring up the Pick Case Request Sub-Category Box (shown below). The available Sub-Category choices correspond to the Category that you have just selected.

10. *Select* the desired Category and Sub-Category combination so that the red arrow is pointing to the record.
    Use the up and down arrows on your keyboard or click the desired record with your mouse.

11. *Press* **Enter** on your keyboard.
    Your selection has now been populated in the Sub Category field.

12. [NOTE: Review the summary of the problem with the caller. Verify that the Issue Category and Sub Category are correct.]
    Review the issue summary with the caller.
    Ensure that you have selected the appropriate category and sub category for the issue.
    Make any necessary adjustments by clicking on the previous questions or using the left view bar.

13. *Enter* information in the following fields:

    - [NOTE: Describe Customer expectation.]
      This is a free-form text field in which you should enter the details of what the customer expects as the outcome of the case.

    - [NOTE: Select Expectation Category.]
      Select from the picklist the result that the customer expects.

    - [NOTE: Select Expectation Sub Category.]
      Select the correct value from the picklist.

- How did you hear about our office?
  Select from the picklist choices that appear.

The following questions apply to the borrower. In the next lesson, we will discuss a third party scenario. For the third party scenario, you will rephrase the questions as needed.

Take Note

- How did you hear about our office?
  Select from the picklist choices that appear.

- *May I have your social security number?
  Enter the borrower's SSN. You may enter the SSN with or without the dashes.

Once again, make sure that this is a **new** customer. If you enter a SSN that already exists in the system, the system will not give you an error until the **end of this lesson**, after you have entered all of the information!

- *May I have your first name?
  Enter the borrower's first name.

- *May I have your last name?
  Enter the borrower's last name.

- [NOTE: Select Jr., Sr., II, etc.]
  Select from the picklist choices that appear.

- What is your middle name or initial?
  Enter the borrower's middle name or initial.

- [NOTE: Select name prefix.]
  Select from the picklist choices that appear.

- Do you have a preferred name or nickname?
  Enter the borrower's preferred name or nickname. Do not answer yes or no.

- May I have your birth date?
  Enter the borrower's birth date in the format mm/dd/yyyy.

- What is your street address?
  Enter the borrower's street address.

- City?
  Enter the borrower's city.

- State?
  Enter the borrower's state.
  Press **F2** to view the values of the picklist. You may press the first letter of the state to quickly find the state abbreviation. *Press* **Enter** once the desired value is highlighted in blue.

- Zip code?
  Enter the borrower's zip code.

- [NOTE: Select country.]
  Select from the picklist choices that appear. USA will default as the answer.

- *What is the best way for our office to contact you?
  Select from the picklist choices that appear.

- Home phone number?
  Enter the borrower's home telephone number.

- Work phone number?
  Enter the borrower's work telephone number.

- Fax number?
  Enter the borrower's fax number.

- Mobile phone number?
  Enter the borrower's mobile telephone number.

- [NOTE: Enter country code.]
  Enter the country code associated with the borrower's home telephone number.
  This will default to the USA country code, 001. Update as necessary.

- Email address?
  Enter the borrower's email address.

- Secondary email address?
  Enter the borrower's secondary email address.

- What is the best time of day to contact you?
  Enter an approximate time of day (e.g. morning, after 3pm, evening).

- [NOTE: Select time zone. Confirm with caller.]
  Select from the picklist choices that appear.

14. OK. I'd like to get a little more information on your loan please.
    Press **Enter**. No response required.

For the following three loan questions, *enter* information about the loan that is **most involved** in the case. The answers that you enter will determine the Ombudsman Specialist to whom this case is assigned.

Take Note

15. *What type of loan do you have?
    Press **F2.** This will bring up the Pick Loan Type Box.
    Scroll to the right to view the entire description of each loan.
    Using the up and down arrows, s*elect* from the picklist choices that appear.
    Ensure that the red arrow is pointing to the desired choice and press **Enter**.

16. *Who holds your loan?
    Select from the picklist choices that appear.

17. *What is the current status of your loan? [Note: If this is a consolidation loan, discuss with the borrower whether the issue happened before or after disbursement. Then, select either Not Disbursed, Problem After Disbursement, Problem Prior to Disbursement, or Unknown from the picklist.]
    Select from the picklist choices that appear.

18. Hold for a moment while I search for further information on [Original Issue Category].
    Press **Enter** twice.

OCTS 2.0 is looking in the Encyclopedia to check for information on this Issue Category. This information is compiled and updated by the System Administrator. Follow Possible Outcome #1 or #2 below.

Possible Outcome #1—The Encyclopedia Contains Detail About this Issue
Information will display on how to discuss the issue with the caller. There may be discussion questions or questions that ask for further information or details. *Try* to resolve the customer's issue by using this information. *Press* **Enter** to continue.

Possible Outcome #2—The Encyclopedia Does Not Yet Contain Detail About this Issue
A message will display indicating that there is no further information about the topic in the database. *Press* **Enter** twice to continue.

19. * [NOTE: Are you speaking with the borrower?]
    Answer Yes, because in this lesson we are talking to the borrower. Confirm with the caller if necessary.

20. [NOTE: Can you resolve the issue now?]
    Answer Yes or No.

Depending on whether or not you can resolve this case without sending it to an Ombudsman Specialist (according to your answer to the question above), you will follow either Possible Outcome #1 or #2 below.

Possible Outcome #1—You Can Resolve and Close this Case Now

If you answered Yes to the question in step 20, you will see the following message:
[NOTE: Press Enter twice to end the script. Record the case number located in the dashboard. Go to the Cases Screen, Results Search View and add a result for this case. Then, close the case.]

- *Press* **Enter** twice to end the script.

- *Record* the case number that appears on the dashboard.

- *Go* to the Cases Screen, All Cases Screen.

You must now find this case.

- *Click* the New Query button on the tool bar.

- *Enter* in the Case # field the case number that you just recorded.

- *Press* **Enter**.
  The case that you have just entered should appear and should be selected (with a red arrow pointing to the left of the record).

You must now assign this case to a generic ID so that it will not be assigned to an Ombudsman Specialist.

- *Click* the **drop-down arrow** button in the Ombudsman field in the form applet at the bottom of the screen.
  The Pick Case Owner Box appears. You must now assign this case to a generic ID called "GENASSIST."

- *Type* GENASSIST in the starting with field at the top of the Pick Box.

- *Press* **Enter**.
  The General Assistance ID will be automatically populated in this field.

You will now add a result to this case.

- *Go* to the Results Search View.
  The detail of this case is in the form applet on the top of the screen. The result of the case will be entered in the applet at the bottom of the screen.

- *Click* the **New** button in the Results applet at the bottom of the screen.
  The Results Pick Box appears.

  If you want to pick an existing result, follow these steps:
  – *Click* the **drop-down arrow** button in the Find field at the top of this Pick Box.
  – *Select* the field in which you want to search.
  – *Enter* the search criteria in the starting with field.
  – *Click* the **Find** button at the top of the Pick Box.

      –   *Select* the desired result.
      –   *Click* the **Pick** button at the bottom of the Pick Box.
            The result will populate the fields on the left side of the Results applet.

    If you want to enter a new result for this case, follow these steps:
      –   *Click* the **New** button at the bottom of the Pick Box.
            This creates a new results record.
      –   *Select* the Result Category from the picklist in the Result Category field.
      –   *Select* the Result Sub Category.
      –   *Enter* a short name for this result in the Name field.
            This is a short free-form text field. Make sure that the name of the result is
            generic so that it can be used for cases in the future.
      –   *Enter* more generic result detail in the Result field if desired.

- *Enter* values in the Proposed By and Implemented By fields if desired.

- *Enter* any comments specific to this case in the Comments field.

   You are now ready to close this case.

- *Click* on the **drop-down arrow** button in the Status field in the Cases applet at the top of the screen.

- *Select* Closed.

For more detailed instructions on how to add a result and close a case, please refer to Module 6, Lesson 1 of this guide.

Take Note

Possible Outcome #2—This Case Must Be Assigned to an Ombudsman Specialist
If you answered No to the question in step 20, you will see the following message:

Now that I have taken all of your profile information, your case will be assigned to an Ombudsman Specialist. In a moment, I will provide you with a case number for your reference. An Ombudsman Specialist will be contacting you. Thank you for calling.
[NOTE: Press Enter twice to end the script and provide caller with case number.]

- *Press* **Enter** twice.
   Once you end the script, the case number will populate in the dashboard as shown below.

- *Give* the case number to the customer.
   The case will now be assigned automatically to an Ombudsman Specialist.

Congratulations!

You have now created a case for a new customer using scripting! You have either resolved and closed the case, or you have sent the case to an Ombudsman Specialist.